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THE MAGAZINE OF THE SOCIETY FOR TECHNICAL COMMUNICATION

SPECIAL ISSUE

THE STATE OF TECHNICAL COMMUNICATION: A VIEW FROM OUTSIDE THE INDUSTRY

About the Study 7

The Best and Worst Experiences of Working with Technical Communicators 10

Expectations of Technical Communicators 14

What Drives Perceptions of Technical Communicators? 18

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January/February 2021

Volume 68 | Issue 1

2 **From the Editor**
By Andrea L. Ames

4 **From the Guest Editor**
By Saul Carliner

FEATURES

7 **About the Study**
By Saul Carliner and Yuan Chen
How the survey was conducted and describes the "customers" who participated in it.

10 **The Best and Worst Experiences of Working with Technical Communicators**
By Saul Carliner and Yuan Chen
Have technical communicators contributed to a positive work environment or made life more frustrating for the study participants?

14 **Expectations of Technical Communicators**
By Saul Carliner and Yuan Chen
What makes an effective technical communicator? And do technical communicators meet these expectations?

18 **What Drives Perceptions of Technical Communicators?**
By Saul Carliner
Technical communicators need to pay more attention to the perceptions of their customers. This article identifies two categories of drivers of perceptions, suggests a way to address them with customers, and closes with one other issue raised by this study.

SOCIETY PAGES

21 **Upcoming Online Course**
Free Webinar for STC Members

22 **Get Ready for 2021 Summit**

23 **2021 STC Election Results**

COLUMNS

ETHICS

24 **Ethical COVID-19 Communication: Use Plain Language**
By Russell Willerton

ASK A TECH COMM MANAGER

26 **Getting Started Speaking at Conferences and Handling Pandemic Struggles**
By Kit Brown-Hoekstra and Cindy Currie

MEET THE CHANGE AGENTS

28 **Automating the Production of Software Documentation Videos: An Interview with Mark Hellinger**
By Scott Abel

DEPARTMENTS

OFF HOURS

32 **An Ode to Words**
By Michelle Corbin

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Executive Editor Andrea L. Ames
Editor Sarah Black
Designer Amy Bachhuber

CONTRIBUTING EDITORS
Scott Abel, *Meet the Change Agents*
Thomas Barker, *The Academic Conversation*
Kit Brown-Hoekstra and Cindy Currie, *Ask a Tech Comm Manager*
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SOCIETY FOR TECHNICAL COMMUNICATION
3251 Old Lee Highway, Suite 406
Fairfax, VA 22030
+1(703) 522-4114 | +1(703) 522-2075 fax
Send questions and correspondence to the editor at the above address. General information about STC: stc@stc.org *or* www.stc.org.

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A Note from the Editor

BACK IN 2017, at my first *Intercom* Editorial Advisory Committee (EAC), I worked with the group to get input on my proposed themes for the upcoming 2018 editorial calendar. I wanted to wrap up the year with a report on the state of the industry, and Saul Carliner stepped into the breach with his PhD student, Yuan Chen, and designed a study, collected and analyzed the results, and presented the findings and analysis in the December 2018 issue.

When that issue was complete, Saul suggested a similar study from a different perspective—that of our customers, the people who pay us (or don't). He suggested waiting until December 2020 to publish an issue of *Intercom* with the results of that study, and here it is: A view from *outside* the technical communication industry.

If you aren't familiar with Saul, he is a professor of educational technology at Concordia University in Montreal, and a Fellow and Past President of STC. He was president of STC when I took on my first Society-level volunteer role, so we go back a long time (yes, decades).

As with the December 2018 census, for this issue Saul and Yuan designed and administered the survey, analyzed the results, created the tables and figures from the data, and wrote the articles that explain the data. Saul also draws some interesting conclusions, and I think you will find the results very beneficial for considering your—and your team's—role in the organization,

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especially as it makes clear many perceptions of us. Thank you, Saul and Yuan, for your hard work in devising the study and for uncovering the insights from it!

American political strategist, Lee Atwater, famously said, "Perception is reality." While I find this idea both profoundly right *and* profoundly wrong, there's no question that there is great benefit in understanding others' perceptions and, usually, managing those perceptions. This issue will give you some insights into perceptions about technical communicators and our value that are held by the people with whom we work most. I encourage you to use this as a jumping-off point, not a destination, so that you can dig into the perceptions in *your own* work environment and discover what attention you might want to pay to them.

As always, we have a great column lineup for you.

- In "Ethics," Russell Willerton discusses the use of plain language to communicate more ethically, in particular about COVID-19.
- The pandemic theme continues in "Ask a Manager," where Kit Brown-Hoekstra and Cindy Currie address struggles around focus and overwork. On a more positive note, they also provide advice for novice conference speakers to get started!
- In "Meet the Change Agents," Scott Abel interviews Mark Hellinger of Videate, and they discuss the application of artificial intelligence and robotic process automation in the creation of videos from software product documentation.

Don't miss all the latest STC news in the Society Pages, and be sure to engage with us! Your experience with the great information in this issue is enhanced by discussing it with the columnists, Saul and Yuan, and me! Reach out online, by email, or on social media.

As this is my last issue as Executive Editor of *Intercom*, I hope you will indulge me while I acknowledge all of those who provided this opportunity and made it a delight and an inspiration over the past three years.

For the opportunity: Liz Pohland, STC CEO; Saul Carliner, *Intercom* EAC chair; and the 2017-2018 Board of Directors.

For the delight: All of the 2018, 2019, and 2020 guest editors, authors, and columnists—the talented folks who have made the last 24 issues of *Intercom* exceptional and who have made my job as executive editor a joyful and rewarding experience. And my assistant, Sarah Bonneville, who has so skillfully and with great patience managed the administrative aspects of the editorial process with me and all of the guest editors, authors, columnists!

For the inspiration: You, dear reader. You inspired me to always want to show up and provide the very best themes, columns, and feature articles to educate and inform—and I hope, to inspire and delight—you.

Until we meet again: To your wild success!

— Andrea L. Ames
andrea@idyllpoint.com

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Guest Editorial

BY SAUL CARLINER | *STC Fellow*

MY VERY FIRST management consulting experience in technical communication involved advising a technical communication group in a large telecommunications firm about quality. The director of the group of about eight departments and 100 people had been told by his vice president that it would be a good idea to "measure" quality. But when the director asked the vice president what to measure, the vice president responded, "I don't know. You figure that out."

To prepare for the assignment, I interviewed the eight managers reporting to the director about their work to get ideas about what could be measured. I learned that this group primarily produced documentation to support telephone switching equipment for landlines. Most of the documentation provided guidance for troubleshooting problems with these lines.

I also learned that the company built extremely reliable products, so the documentation was not used much. Land lines have significantly higher reliability than mobile lines—surpassing 99% up time.

Perhaps most importantly, I learned that the biggest problems did not arise from difficulty that users had with the documentation but from internal skirmishes over the documentation with the software and hardware development teams. To this outsider, that seemed to be the focus for the group's measurement "issue." The documentation was just-in-case documentation, used "just in case" something failed and the highly trained service representative needed to check something. The real reason this group would need to measure anything was to track relations with the internal teams: The vice president of research and development, the software and hardware development groups, and the quality assurance group.

I suggested that my client focus on tracking the technical communication group's relationship with its internal sponsor. This was in keeping with the advice of a then-popular book in my second field of training, *Training for Impact* by Dana and James Robinson, in which they emphasize the importance of managing the relationship with the sponsor's organization—the sponsor being the person who can authorize or stop payment for services.

This advice was also consistent with advice I had received in courses on marketing research and training evaluation, both of which recommended checking with the client about what's most important to them. Based on the interviews with the technical communication managers, that relationship with the client was the most important.

The managers agreed.

The director didn't.

To say he didn't like the advice, well, let's just say that I am thankful he paid the bill. (According to Judge Judy, he had to; the law says that if someone provides the promised service, the client is obligated to pay.)

The director wanted to track reader responses to the documentation. I received this assignment as PCs were gaining widespread use in the workplace and the majority of technical communicators worked on end-user documentation. The messages at the time encouraged technical communicators to write for their end users, many of whom were fully dependent on the documentation to use hardware and software that played a central role in their daily work.

The director did not grasp that the needs of untrained users of commercial products, who had a strong dependency on the product information substantially differed from the needs of highly trained users, who only used documentation occasionally and on which they were only moderately dependent. He could not see what was staring him in the face: His vice president was starting to question the value of the technical communication group and she wanted the director to figure out how to please her.

Although end users are important to the effectiveness of technical communication products, they often don't play the central role in our employment that we think they do.

Yes, I know that's counter to technical communication orthodoxy.

Consider this: In many cases, end users don't even play a role in choosing the software or hardware that they use; someone else inside the organization does. Even when they do choose the software and hardware, end users rarely interact with technical communicators. Although end users are central to the act of communicating, they don't play a role in the employment of technical communicators. They're often invisible from the daily work of technical communicators.

More significantly, end users do not hire technical communicators, fire us, fund us, or conduct performance evaluations of our work. End users do not outsource our work or determine that programmers, engineers, and other technical professionals are just as capable of producing documentation as professional technical communicators are.

Our "customers" *do* perform those tasks and make those decisions.

That seems obvious to the 20% to 25% of technical communicators who work for service firms or as independent contractors.

But even those technical communicators working internally have "customers." These customers include:

- The executive of the group that funds the technical communication group, known as the sponsor, who not only authorizes the budget for technical communication but can also authorize cuts and outsource the function.
- An ombudsperson (if one exists), a person in the sponsor's organization who acts as the liaison between the technical communicators and the subject matter experts who review the materials, as well as management and the executive of the group.
- Subject matter experts, including engineers, programmers, scientists, business analysts, product managers, legal specialists, quality assurance engineers, and others who have technical expertise and assist technical communicators in preparing their work

Despite the centrality of this executive "customer" and the people who work for them, technical communicators rarely explore their perceptions of us. Although our literature has case studies of particular projects and studies of what employers seek when hiring technical communicators, it is light on general perceptions of technical communicators held by these "customers" across geography, organizations, and industries.

This special issue of *Intercom* is intended to fill that gap. It reports the results of a survey of "customers" of technical communication. Specifically, it includes the following articles.

- "About this Study" describes how the study was conducted and who participated in it.
- "About Participants' Working Experiences with Technical Communicators" characterizes the ways in which participants work with technical communicators and their feelings about the experience.
- "Best and Worst Experiences of Working with Technical Communicators" describes, as its title suggests, the best and worst experiences that "customers" have had working with technical communicators, as well as whether these "customers" would continue working with technical communicators if given the choice.
- "Expectations of Technical Communicators" describes the job skills, characteristics, and attitudes that "customers" hold of technical communicators, as well as the extent to which technical communicators meet these expectations.
- "What Drives Perceptions of Technical Communicators" identifies a number of issues that drive perceptions of technical communicators, awareness of which you can use to manage your relationships with your own "customers."

This focus on "customers" perceptions also aligns with two emerging areas of interest in fields related to technical communication. Within the field of User Experience Design is an emerging discipline of service design, which focuses on the design and implementation of a service like ours, including managing the perceptions of the people who purchase that service ("customers"). The other is an emerging area of interest in the field of training and development called Partnering with Clients, which identifies five core competencies needed to manage relationships with clients.

Before closing, I would like to thank several people for their assistance with this issue. First, I would like to thank STC Chief Executive Officer, Liz Pohland, and *Intercom* Executive Editor, Andrea Ames, for supporting this project. I would also like to thank the two of them, along with the STC Board, for their help in promoting the survey. Last, I would like to thank Yuan Chen, my co-author, who handled all of the logistics of the online survey.

About the Study

BY SAUL CARLINER | *STC Fellow* AND YUAN CHEN

AS NOTED IN the guest editorial, whether they work externally or internally, technical communicators have customers. Throughout this issue's feature articles, *customer* refers to the organization that pays for the services of technical communicators—and can stop payment on those services. Externally, most people realize that they work for a client or customer, but even those technical communicators who work internally have customers: The group in the organization that can approve the budget for the technical communication—and withhold it.

Technical communicators interact regularly with their customers. Although they might not regularly interact with the executive of the company who hired them or the one who oversees an internal technical communication group, they often interact with an *ombudsperson*—a leader in the customer group who serves as the go-to person—as well as the many subject matter experts (SMEs) who provide and review technical content.

Given the centrality of customers to our work—the extent of our ongoing interactions with their SMEs and their influence over the funding of the internal and external groups for which we work—exploring customers' perceptions of technical communicators makes sense. That's the purpose of this study.

This article explains how the study was conducted and describes the "customers" who participated in it.

How We Conducted This Study

This study explores perceptions of technical communicators held by the people who either pay for their services (for example, vice presidents of product development and directors of marketing) or who work for the people who pay for technical communication services. In this study, these people are called *customers* of technical communication.

Also, in this study, *technical communicators* are defined as professionals who perform the following work, as well as those who manage them.

- Identify, design, and develop the instructions for users, service representatives, marketing representatives, and others who use complex software, hardware, and related products
- Prepare reports, proposals, and other materials about scientific and engineering projects
- Edit, illustrate, and translate this content

Specifically, this study explores perceptions of:

- General customer experiences of working with technical communicators
- The specific value that technical communicators offer to customer organizations
- The qualifications customers see as most important for an effective technical communicator
- General customer perceptions of the profession

Recruiting customers for this study was a bit tricky. Because we did not have a direct partner who could provide us with access to the people who serve as our customers, we tried to reach them through technical communicators. Through the STC, we sent recruiting messages to its mailing list, which asked recipients to forward on the invitation to the customers in their organizations. STC also posted the announcement on its website.

Customers who chose to participate in the study participated in an online survey. After clicking on a link in the email invitation or online announcement, participants visited the page for the survey, which presented an Information and Consent Form that explained the survey and asked participants to explicitly agree to continue with the survey.

Those who agreed to continue received a qualifying question to ensure that they were not technical communicators or their managers. Those who indicated that they identify as technical communicators or their managers were thanked for their willingness to participate, sent to a screen outside of the survey, and did not continue.

Those who met the qualifications for the study completed the survey. When participants finished the survey, the system displayed a thank-you message.

The survey took between five and ten minutes to complete.

Before launching the survey, we conducted user tested it to make sure that the instructions and questions were clear. This resulted in a few minor changes in wording to some of the questions at the suggestions of the participants.

Of the 81 people who started the survey, 48 identified as technical communicators and they did not continue the survey. The rest of this special issue reports the results of the 33 responses that we received.

This is admittedly lower than we had hoped, so in the rest of this article, we not only explore the characteristics of the customers who participated but contrast the characteristics of their employers to see how representative it is to the sample in the 2018 Census of Technical Communicators (December 2018 issue of *Intercom*). If strong similarities exist, then the organizations represented in this survey could be said to have some level of alignment with those for which technical communicators work, as identified in the 2018 census.

The Types of Organizations for Which "Customers" Work

This section describes the organizations for which participants work. As noted earlier, we compared the results of this sample with the results of the 2018 Census of Technical Communicators (December 2018 issue of *Intercom*) to determine whether the employers for which customers in this study worked seemed representative of the employers identified in the earlier study. If the two

aligned, then the results of this study could be said to be reflective of the larger field.

Because of the smaller sample size, participants in this study worked in a smaller number of industries than those who responded to the 2018 Census of Technical Communicators. However, the two largest industries in both surveys are the same—IT services and solutions and technology—and the proportions are somewhat similar in the two studies.

For example, 15.1% of participants in this perception study work in the IT services and solutions industry and while 14.7% of participants in the census did. Similarly, 27.3% of participants in this perception study work in the technology industry and while 23.7% of participants in the census did. Similar alignment exists in other industries. Table 1 identifies the industries in which participants in this perception study work and compares that with the results of the 2018 census.

In terms of the sizes of organizations for which participants work, the largest percentage (39.4%) worked for large organizations with 10,000 or more workers. The second largest percentage of participants (24.2%) work for small organizations with 100 or fewer workers. Although similarities exist between the sizes of organizations represented by the participants in this study and those technical communicators who participated in the 2018 census, participants in this study are more likely to work in large organizations and far less likely to work in organizations with 101 to 1,000 workers than those in the 2018 census. The alignment between the two groups is not as strong as the alignment in industry. Table 2 identifies the sizes of organizations in which participants in this perception study work and compares that with the results of the 2018 census.

In terms of geographic regions in which participants work, participation outside of the United States was

Table 1. Industries in which participants work and compared with participation in the 2018 census

Industry	This Perception Study	2018 Census
Advertising and Media	3%	0%
Business Services	6.1%	3.4%
Communications	0%	3.2%
Construction	0%	0.3%
Consumer Products and Services	0%	2%
Engineering, Architecture, and Construction	9.1%	4.7%
Entertainment	0%	0.3%
Finance and Banking	3%	4.1%
Government and Military	9.1%	4.1%
Health and Medical Services	0%	3.2%
Health Care Information Technology	0%	4.7%
Higher Education	12.1%	7.5%
Hospitality	0%	0.6%
Information	0%	2.1%
Insurance	0%	1.2%
IT Services and Solutions	15.1%	14.7%
Manufacturing	6.1%	8.4%
Marketing Services	0%	0.2%
Medical Equipment and Devices	3%	2.4%
Nonprofit	3%	1.1%
Private Security Solutions	0%	0.3%
Professional Services	0%	3.8%
Real Estate and Insurance	0%	0.3
Residential and Commercial Services	0%	0.5
Retail	0%	1.1
Scientific equipment manufacturer	0%	0.8
Technology	27.3%	23.7
Transportation	0%	1.1
Wholesale/Distribution	0%	0.2

much lower in this perception study than in the 2018 census. For example, the census had participants from East Asia, India, Israel, and South and Central America, but no participants from those regions in this study. Within the United States, no one from the Northwest and Alaska (Alaska, Idaho, Montana, Oregon, Washington, and Wyoming) participated in the perception study. This is a concern because this region is a strong employer of technical communicators.

Two areas also had much greater participation: Canada (15.1% in this study versus 10.2% in the census) and the Mid-Atlantic region of the United States (Delaware, District of Columbia, Maryland, New Jersey, Pennsylvania, Virginia, and West Virginia) (27.3% in this study versus 10.6% in the census).

Other than those exceptions, participation rates were generally the same across regions suggesting some level of similarity between the organizations represented in the two studies. Table 3 identifies the geographic regions of organizations in which participants in this perception study work and compares that with the results of the 2018 census.

Conclusion

Although the size of the sample for this study is smaller than we had hoped, the types of employers represented share sufficient similarities with those for which technical communicators work that an alignment exists between the two. That suggests that the results of this study provide insights into the perceptions of technical communicators that all technical communicators should consider as they work with their customers. But note that these are just insights to consider; the results of this study do not broadly generalize.

SAUL CARLINER *(saulcarliner@hotmail.com) is a professor of educational technology at Concordia University in Montreal, a past editor of the* IEEE Transactions on Professional Communication, *and a Fellow and Past President of STC.*

YUAN CHEN *(yuan.chen@mail.concordia.ca) is a PhD candidate in educational technology at Concordia University, where her research focuses on the perceptions of instructional designers in higher education held by the faculty who work with them. She is also an instructional designer at Carleton University.*

Table 2. Size of organizations in which participants work and compared with participation in the 2018 census

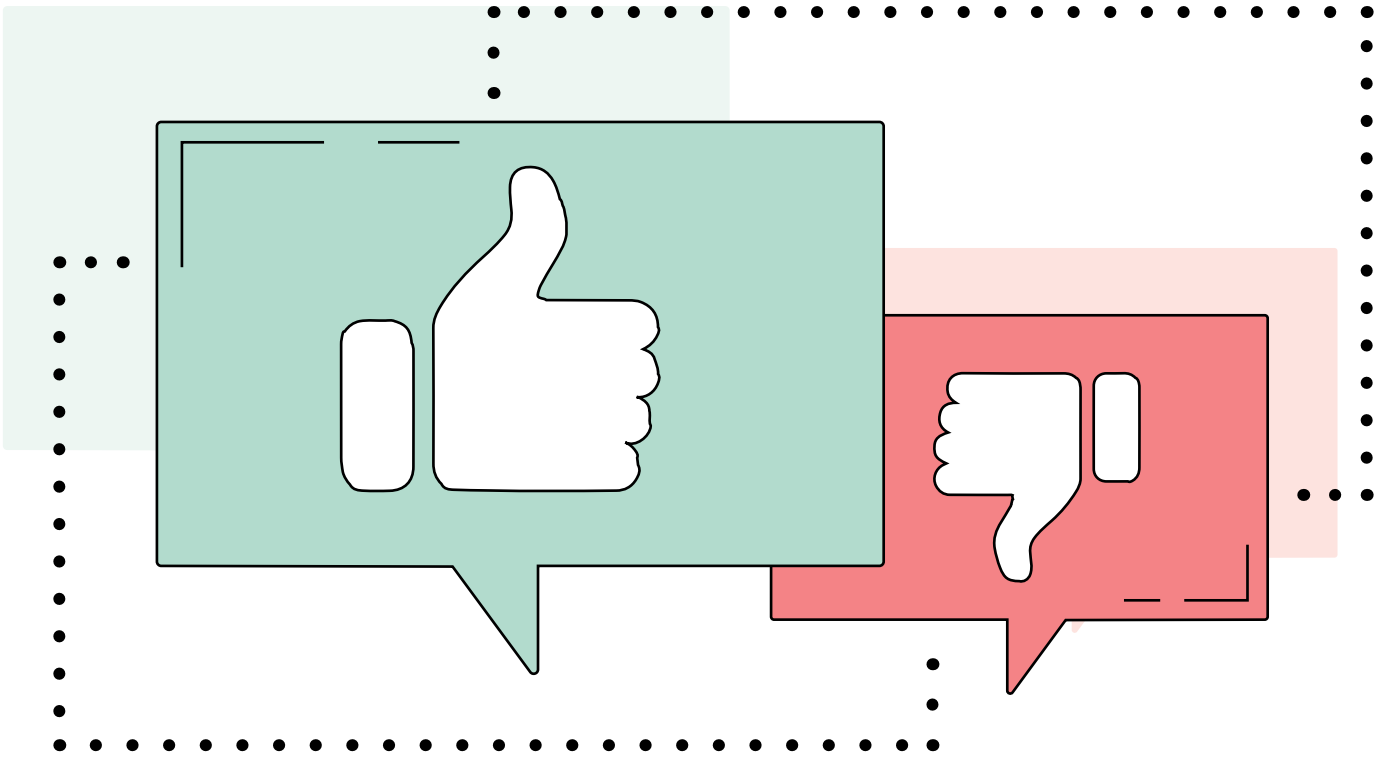
Size of Organization (in Number of Workers)	This Perception Study	2018 Census
1–100 workers	24.2%	20.7%
101–1,000 workers	12.2%	29.2%
1,001–10,000 workers	21.2%	25.2%
10,001+ workers	39.4%	24.8%

Table 3. Geographic regions of organizations in which participants work and compared with participation in the 2018 census

Participants' Geographic Region	This Perception Study	2018 Census
Australia/New Zealand	0%	1.8%
Canada	15.1%	10.2%
East Asia	0%	0.2%
Europe	3%	3.1%
India	0%	3.1%
Israel	0%	0.5%
Mexico, Central American or South America	0%	0.2%
Other	0%	1.4%
United States—mid-Atlantic (Delaware, District of Columbia, Maryland, New Jersey, Pennsylvania, Virginia, and West Virginia)	27.3%	10.6
United States—North Central (Illinois, Indiana, Iowa, Michigan, Minnesota, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin)	6.1%	17.6
United States—Northeast (Connecticut, Maine, Massachusetts, New Hampshire, New York, Rhode Island, and Vermont)	9.1%	10.6
United States—Northwest and Alaska (Alaska, Idaho, Montana, Oregon, Washington, and Wyoming)	0%	4.7%
United States—South Central (Arkansas, Kansas, Missouri, Oklahoma, and Texas)	3%	7.2%
United States—Southeast (Alabama, Florida, Georgia, Kentucky, Mississippi, Louisiana, North Carolina, South Carolina, and Tennessee)	15.1%	12.8%
United States—Southwest and Hawaii (Arizona, California, Colorado, Hawaii, Nevada, New Mexico, and Utah)	12.1%	16.2%
Other: Global (one identified as "superlarge" IT/services consulting firm)	9.1%	1.4%

THE BEST AND WORST Experiences of Working with Technical Communicators

BY SAUL CARLINER | *STC Fellow* AND YUAN CHEN



HAVE TECHNICAL COMMUNICATORS contributed to a positive work environment or made life more frustrating for the customers of technical communication (the internal or external groups that pay for technical communication services)?

This article offers some insights. It specifically describes the best and worst experiences that customers of technical communication have experienced, as well as whether these customers would choose to continue working with technical communicators.

The Best Experience Working with a Technical Communicator

Participants described a variety of positive experiences working with technical communicators. The most common response focused on the ways that technical communicators added value to the communication efforts of their organizations. Nine of 33 participants noted this.

Participants specifically lauded the ability of technical communicators to align material to specific audiences and provide those audiences with "important details." Another noted that an earlier version of their "user guide was a very confusing document that was not up to date. A technical writer worked with development, product management, and QA and updated the guide. The changes were great."

Others described collaborative experiences that led to particularly effective communication materials. For example, one participant commented that "although we had a short time frame to produce the user guide… it was a very smooth process. Our tech writer was able to incorporate clear instructions to the target user. It was a fast and great experience all around."

Another added that the relationship had "the sense of cooperation, driven by a mutual commitment to ensure that our product documentation was as accurate, clear, and comprehensible as possible."

The second most common response focused on the role that technical communicators play in strengthening work processes and making them more efficient, something noted by seven of 33 participants. Sometimes, that involves preparing resources so that customers can produce materials on their own, such as "templates/forms that made it easier for me to write" and "doing more than just reviewing my document for typos/formatting." Another focused on the independence of technical communicators, commenting that theirs "could sit down at a system and document their experience with minimal hand holding."

One participant noted the role that technical communicators played in successfully working with offshore partners. "This started as a challenge, but our internal team did a great job of screening candidates and training new hires, so now we've had a very strong group in India . . . preparing materials for our largely North American audience."

The third most common response focused on the role technical communicators play in addressing surface communication issues, something mentioned by four of 33 participants. These include proofreading, formatting, and editing reports to become "much higher quality document[s]," and using "technology/animation tools to develop short and to-the-point online tutorials that users…got value from."

Three participants mentioned that technical communicators added value to the product on which they were working. For example, one participant commented that the technical communicator contributed "to the intellectual property itself, improving usability, and seeing the information as a product that they were creating rather than something just to be documented."

Two participants offered more general observations on the best experiences they have had working with technical communicators.

And one commented that: **"**The best experience I had was when I was a starting developer and I kept changing the way the product worked and the head of documentation was telling me to stop. And I asked him how does he do his job. So, he explained what he needs to do with every change I make. It was the first time I truly understood what kind of work that documentation does." In other words, the technical communicator politely explained the impact of the developer's actions on the material the communicator prepared.

The Worst Experience Working with a Technical Communicator

In addition to these positive experiences, participants described a variety of negative experiences working with technical communicators.

The most common responses focused on the quality of the work, something mentioned by nearly a third of participants. Four specifically commented on technical communicators who did not understand the product or subject about which they were writing. In some cases, the technical communicator merely "wordsmithed" the material provided to them, such as the technical communicator who "either just replayed an interview or edited my written input." That participant felt technical communicators provided "minimal value add."

Another participant lamented that "I provided the writer with word for word text for a few chapters in user guide, and the writer decided to rewrite incorrectly—and without change bars so very difficult to find all edits to be corrected."

And one customer became so frustrated that they just gave up. "I [was] trying to explain how a feature worked but it got to the point where I just let you go because I was getting [too] frustrated trying to explain it."

Others found the quality of the work provided by technical communicators to be inadequate, finding grammatical errors in work technical communicators approved and technical communicators constantly rewriting the participants' work, resulting in numerous inconsistencies.

The second most common category of negative experiences pertained to customer service, an issue raised by five of 33 participants. Several complained about lack of motivation on the part of the technical communicator, and one complained about resistance to late changes.

But one participant encountered humor that fell flat with them: "Once, I provided a quick turn around on a proposed article for publication, and received snarky comments in email on my grammar, shared with a larger group of employees. I'm sure it was intended for humor, but it wasn't very amusing at the time."

The third most common category of negative experiences pertains to efficiency and work processes—such as communicators taking "weeks to complete basic tasks and would constantly get stuck thinking about it"—and version control issues.

In one instance, the participant sympathized with their stretched technical communicator. "We only have one person and he's swamped."

One participant noted negative experiences resulting from a lack of assertiveness on the part of the technical communicator. "If my format looks like crap—tell me. Let's fix it. Give me new ideas and build recommendations without other people asking for it."

Of particular note, seven of 33 participants commented that they did not have a negative experience to report. "Personally, I can't recall an experience which was not positive." "I have not seen our [Technical Publications] group 'crash' a project in the 12 years I've been with this company!"

Would Participants Continue Working with Technical Communicators

The good news is that, overwhelmingly, customers would choose to do so: Nearly 94% said yes. Only 3% said no, and another 3% were not sure.

Reflecting the perspective of those who would not continue working with technical communicators, a participant noted, "Overall, an intellectually curious, talented junior outside the tech community field, given an example of great tech comm work, seems to do it better than many professionals. That said, when done

well, the information adds measurable value to the service with true impact."

For the overwhelming majority who would continue working with technical communicators, the primary reason for doing so was the contribution of technical communicators to their organizations, something mentioned by eight of 33 participants. In some cases, participants appreciate the personal guidance they receive from technical communicators on their writing—especially grammar, style, and formatting, the "professional[ism]" communicators bring to materials—and recognize that communication is not their best skill.

Others feel that the communication products produced by technical communicators make their external communication better. One noted that "Engineering may be 'scientific' but there's certainly an 'art' to it as well. Many think that writing is *only* an 'art' but the reality is that technical writers must bridge the challenging gap between the 'art' and the 'science' and I admire that as a very valuable skill!"

Three participants commented that technical communicators add to the customer experience and the quality of the product, an issue noted by six of 33 participants. Sometimes, the contributions come before the communication materials are produced. For example, one participant commented that technical communicators "help fill in the blanks with some processes. They may see steps we omit that are automatic to the super user."

Several commented on the role of technical communicators in "act[ing] like a voice of a customer." One participant added, "Sometimes we in development do not do a good job explain[ing] steps and procedures [be]cause we talk with a tech background…our end users may be from the business. [Our technical writer] helps us explain things to the non-tech person in ways we could not."

A third reason that customers would choose to continue working with technical communicators is that having someone focus on communication lets the technical professionals focus on their own jobs and reduces their own workloads. One added, "I don't have time to do the [technical communicator's] job."

Another participant added that technical communicators "provide a great service that is sometimes overlooked. If we had to do them ourselves without a tech communicator it would take a lot longer and would not be delivered in a way that is easily understandable. They are the UX of tech information because they understand how to reach the intended audience through words."

Four other participants offered general comments on why they would continue working with technical communicators. For example, one noted, "I appreciate the opportunity of working with people from different backgrounds who share a common objective and are open to constructive input."

Two participants noted that they had become dependent on their technical communicators, with one commenting that they have "no other option" and another commenting that their technical communicator "is pivotal to our operation and we need to clone her."

And one wistfully noted that their organization does not take full advantage of the capabilities of their technical communicators. "Our software is very complex, and the Doc team is terribly overworked, so they don't get far beyond documenting the screens and the fields on the screens. I think they could do so much more if they had the proper resources. Unfortunately, they've been so understaffed for so long that people no longer see their value; consequently, they will never get the resources they need."

"Many think that writing is only an 'art' but the reality is that technical writers must bridge the challenging gap between the 'art' and the 'science' and I admire that as a very valuable skill!"

The Experience of Working with Technical Communicators

Considering the comments in their entirety, participants overall seem to have a positive attitude toward working with technical communicators. Although some participants feel that technical communicators can make a positive addition to the products and services of the organizations they serve, more participants comment on the ability of technical communicators to grasp the subject about which they are writing and effectively communicate it using clear, effective language; in a grammatically and stylistically correct way; and with excellent formatting.

Customers also seem to appreciate working with responsive, independent, and curious technical communicators.

SAUL CARLINER *(saulcarliner@hotmail.com) is a Professor of Educational Technology at Concordia University in Montreal, a past editor of the* IEEE Transactions on Professional Communication, *and a Fellow and past president of STC.*

YUAN CHEN *(yuan.chen@mail.concordia.ca) is a PhD Candidate in Educational Technology at Concordia University, where her research focuses on the perceptions of instructional designers in higher education held by the faculty who work with them. She is also an instructional designer at Carleton University.*

Expectations of Technical Communicators

BY SAUL CARLINER | *STC Fellow* AND YUAN CHEN

WHAT MAKES AN effective technical communicator? And do technical communicators meet these expectations?

This article explores these and other questions. Specifically, it reports

- Customer expectations of technical communicators in their own words (customers are the internal or external groups that pay for technical communication services)
- The extent to which technical communicators meet those expectations
- Customer rankings of six major qualifications for technical communicators.

This article also reports on how customers see technical communication roles within the larger schemes of their organizations.

Expectations When Working with a Technical Communicator

Participants described a variety of skills, knowledge, and abilities that they expect in technical communicators.

The most common expectation is that customers expect technical communicators to understand the product or subject about which they are writing. Nearly a third of all participants commented on this. When commenting on this, some participants specifically added the "use case" for the product or subject.

Several participants commented on subject matter expertise in a general way, such as "Someone who knows about the product they are a technical communicator for" and an "understanding of what we are trying to convey to the customer in our tech documents."

Some participants specifically suggested that technical communicators needed to learn about the subject independently. "I would love for them to understand the feature we're putting in, and the client need it's fulfilling."

Other participants expect technical communicators to synthesize material from several sources. "I expect the technical communicator to be sufficiently knowledgeable about the company's products and documentation to analyze and blend multiple inputs to achieve the best results."

Still other participants noted that technical communicators need to learn about the subject quickly. "I expect 'right the first time.' I never mind explaining something to someone who needs the info, but explaining it a *second* time is very frustrating. Sure, there can be debate or nuances about [how] best to write something, but I expect technical communicators to be able to get the majority of the understanding on the first pass, and only have tweaks to discuss with SMEs at that point."

The second most common response focused on the ability to produce "professional" materials. For some participants, that focused generally on creating content. "Let me give you a process map or outline of information and you build the procedure for me to get it started. I can revise/fill in the blanks."

But the majority of responses in this category focused more on copyediting and production issues, such as "superb proofreading and adequate content creation," "strong organizational skills and a good grasp of editing software/tools," and "help with grammar, clarifying of ideas, and overall competency of document[ation]."

And one participant noted that they "expect assistance in assuring my documentation looks more polished. I also expect that what I write or the material I provide has a consistent style with other communication in the organization. I also expect that it adheres to standards such as accessibility and can be translated appropriately to other languages."

Eight of 33 participants offered a third category of expectations: Characteristics of a technical communicator. These included:

- "Intellectual curiosity" (two mentions)
- "Team player" (two mentions)
- "Comfortable and confident with their role and capabilities"
- "Knowledgeable and helpful, with right approach to demonstrate and teach"
- Independence—"[someone who can write] without someone else telling them what to write"
- "Technically proficient, excellent communicator, team player"
- "Up to date on latest communication/teaching techniques and tools"

The fourth most common expectation of technical communicators sought by participants is the ability to translate technical information from those who know to those who need to know (the definition of technical communication offered by Barnum and Carliner in their book, *Techniques for Technical Communicators*).

The majority focused on the actual act of transforming material intended for a subject matter expert to an approach suitable for the intended users, such as "someone who can translate technical processes to easy to use instruction for the uninitiated" and "someone who has the ability to take my technical knowledge and translate that into understandable technical communication."

Participants also expected technical communicators who can "translate engineer speak into English" and "someone who is able and interested in working within the team to document changes and new functionality."

But some participants expect technical communicators to go further: "Not only describe mechanically what to do on the screen, but explain why the customer should use this piece of the product, how it will help them, what things to look out for, how to debug issues, etc."

Other characteristics sought include:

- "User centric approach"
- "A vision for the overall purpose of the project"

Participants also expected strong customer service, such as someone who "preps to work with experts," provides

"quick responses," and gives "a reasonable time frame, appropriate to the magnitude of the task, to review the documentation," as well as someone who "will be open to constructive input."

How Technical Communicators Meet Those Expectations

The previous section stated the expectations, but to what extent do technical communicators meet them? According to participants, technical communicators usually or always do (72.7%). Less than 10% of participants feel that technical communicators rarely or never meet these expectations.

Table 1 summarizes the responses.

Table 1. The extent to which technical communicators meet customer expectations

Always	27.3%
Usually	45.4%
Occasionally	18.2%
Rarely	6.1%
Never	3%

Most Important Skills and Characteristics for Technical Communicators

Participants were asked to rank order six skills and characteristics deemed important for technical communicators to possess. Table 2 shows the results, listing the skills and characteristics in order of importance.

Table 2. Skills and characteristics of technical communicators ranked by participants and listed in order of importance

Skill	Score
1. Writing skill	145
2. Technical expertise in the subject matter	125
3. Demonstrates flexibility in light of changing situations	120
4. Works independently	113
5. Meets deadlines	97
6. Follow instructions	93

Technical Communicators' Rank in the Organization

To get a sense of how they perceive the status of technical communicators within the larger organization, participants were asked to rank and order fifteen job titles in terms of their influence within an organization, from most to least influential.

Although customers ranked product managers and engineers as the two with the most influence, their third most influential position offered a bit of a surprise: Information developer, a title for technical communicators introduced in 1981 by IBM that has fallen out of use in the past decade or so. The job titles Information Developer and Information Architect both outranked Programmer in terms of influence.

Also noteworthy are the rankings of jobs associated with technical communication. Below Information Developer and Information Architect, next came Content Strategist, UX Specialist, and Content Developer. Although STC has spent a lot of effort distinguishing between a Technical Communicator and a Technical Writer in the past several decades (including an effort to reclassify the job at the U.S. Bureau of Labor Statistics), customers had nearly identical perceptions of the influence of the two job titles.

Ranked lowest were Documentation Specialist and Technical Editor. Among related communication disciplines, Marketing Communicator ranked a bit higher than job roles associated with technical communication while Instructional Designer ranked near the bottom.

Table 3 lists the ranking of all these job titles by participants.

Table 3. Rank ordering of the influence of particular job roles within an organization from most to least influential

Job title	Score
Product Manager	402
Engineer	377
Information Developer	350
Business Analyst	330
Information Architect	311
Programmer	300
Marketing Communicator	270
Content Strategist	262
UX Specialist	251
Content Developer	250
Technical Communicator	228
Technical Writer	215
Instructional Designer	190
Documentation Specialist	162
Technical Editor	161

If this list of job titles looks familiar to readers of *Intercom,* it's because technical communicators were asked to rank the same job titles in the 2018 Census of Technical Communicators. Although some of the rankings differ substantially between the two groups (for example, views on the influence of Information Developers and Instructional Designers differ among the two groups), the top and bottom two rankings are identical, suggesting some alignment between technical communicators and their customers on the influence of particular roles within organizations.

Table 4 compares the two rankings.

Table 4. Comparison of the rank ordering of the influence of particular job roles within an organization by customers and technical communicators

	Ranking by "Customers"	Ranking by Technical Communicators
1	Product Manager	Product manager
2	Engineer	Engineer
3	Information Developer	Business Analyst
4	Business Analyst	Programmer
5	Information Architect	Information Architect
6	Programmer	Content Strategist
7	Marketing Communicator	UX Specialist
8	Content Strategist	Marketing Communicator
9	UX Specialist	Information Developer
10	Content Developer	Content Developer
11	Technical Communicator	Instructional Designer
12	Technical Writer	Technical Communicator
13	Instructional Designer	Technical Writer
14	Documentation Specialist	Documentation Specialist
15	Technical Editor	Technical Editor

Conclusion

As suggested by both the expectations of technical communicators and the rank ordering of skills and characteristics, technical communicators need both excellent writing skills and strong subject matter expertise. This tension between writing skill and technical prowess is the core tension in this line of work. The ideal technical communicator needs both but, if pressed, writing skill could be more important.

Almost as important, however, are customer service skills of meeting deadlines, following instructions, and treating sponsors, SMEs, and others in the customer's organization with respect.

SAUL CARLINER *(saulcarliner@hotmail.com) is a professor of educational technology at Concordia University in Montreal, a past editor of the* IEEE Transactions on Professional Communication, *and a Fellow and past president of STC.*

YUAN CHEN *(yuan.chen@mail.concordia.ca) is a PhD candidate in educational technology at Concordia University, where her research focuses on the perceptions of instructional designers in higher education held by the faculty who work with them. She is also an instructional designer at Carleton University.*

What Drives Perceptions of Technical Communicators?

BY SAUL CARLINER | *STC Fellow*

IN 1994, STC supported a study that was conducted in Western Canada on the value of technical communicators. Although the study found that organizations felt that technical communicators added value and could describe specific instances in which particular organizations felt they benefitted from technical communicators, the authors of the study could not name any broad, general ways that technical communicators add value.

Perhaps they were asking the wrong question.

It's not that adding value isn't important, but the type of value sought in the Western Canada and other studies in the 1990s primarily explored on the benefits derived *after* organizations publish technical content. And because few organizations actually track whether their published technical content ultimately results in a financial benefit (such content is from an old release; most of them are focused on future releases), their actual assessments of the value added by technical communicators are usually formed through the countless ongoing interactions that occur while developing that content.

That's why technical communicators need to pay more attention to the perceptions of their customers (the internal or external groups that pay for technical communication services) than to the value added. This article identifies two categories of drivers of perceptions, suggests a way to address them with customers, and closes with one other issue raised by this study.

Primary Drivers of Perceptions

This study identified two primary drivers that technical communication managers and their teams should specifically pay attention to.

- Knowledge about the subject of the technical content, as well as its use cases, is important. Participants in this study not only expected it, but many voiced frustration when technical communicators lacked these skills.
- Excellent targeting, writing, copyediting, and production skills are important. Although we technical communicators want to primarily be recognized for our ability to conceptualize material, clients also seem to value our ability to produce "professional" documents, which seems to refer to grammatically and stylistically correct, and visually attractive materials, which some people refer to as *wordsmithing*.

In fact, that latter role is how roughly half of the customers see the role of the technical communicator. This suggests that technical communicators should first determine with which type of customer they are working when starting a project and adjust their expectations of the role accordingly. If customers merely use technical communicators to wordsmith documents, technical communicators will need to broach the extent to which they have liberty to offer suggestions on the content.

Secondary Drivers of Perceptions

Following those primary drivers are several secondary drivers.

- The ability to "translate" technical content for the intended users. In this case, the translation refers to translation from technical language to plain language, not necessarily from English to other languages, like German and Mandarin.
- Taking a user-centric approach, which is an extension of the previous driver.
- The ability to collaborate. Participants commented that they expect team players when working with technical communicators.
- Independence. Participants indicated that they need technical communicators who can learn technical content quickly and accurately with little to no assistance from Subject Matter Experts; they expressed frustration with technical communicators who fail to quickly grasp material.
- Strong client service skills, such as proactive and polite communication, and the appearance of being motivated to work on the project. Participants in this study specifically noted their frustration at working with technical communicators who did not appear to be interested in or motivated by their work.

The data suggest, too, that the published content drives perceptions of technical communicators. Most participants primarily commented on the appearance of the materials, but some commented on the impact of the content on the intended users.

Using These Drivers to Address Perceptions with Customers

One of the challenges with this set of drivers is that, although it is somewhat feasible to generate it from a descriptive survey that is widely distributed like this one, it is difficult to survey customers within an organization about their perceptions of individual technical communicators and technical communication groups.

So technical communicators need to gauge perceptions in other ways. One of the best is for debriefings between the manager of the technical communication group and customers or the ombudsperson in the customer organization. Good times to hold these debriefings include the post-mortems of projects and through annual reviews. During these debriefings, technical communication managers should explicitly address these drivers with the ombudsperson and address concerns that arise in the conversation.

One Other Issue Arising in this Study

The drivers mentioned in this article primarily refer to perceptions of the services provided by technical communicators, but technical communicators also have broader concerns about perceptions of the profession itself.

The ranking of job titles offers numerous insights into the similarities and differences in perceptions of different fields and roles between customers and technical communicators. That the two parties chose the same roles for the top two and bottom two ranked roles suggests some alignment of perceptions among the two groups.

But the survey also offers broader insights into the ongoing debates over the job titles that might best benefit technical communicators, on which ones we should not expend any energy, and on which ones the field needs to address concerns.

In terms of the job titles that could benefit the field, we should pay more attention to the titles information developer and content developer, which customers rank the highest of all job titles in the field, even higher than UX specialist and content strategist, titles that technical communicators prefer.

In terms of job titles on which we should not expend energy, the data suggests that the effort to distinguish between a technical writer and a technical communicator has resulted in negligible differences in perceptions at best. If using the term *technical communicator* is intended to raise the status of the profession, the data suggests that it has not made much of a dent.

In terms of the roles on which the profession needs to pay attention, the results suggest that we should examine why people rank documentation specialist and technical editor so low to determine why and what, if anything, can be done to strengthen perceptions of these roles.

But perhaps the most important driver of perception of technical communication is whether "customers would choose to work again with technical communicators if given a choice. This aligns with the Net Promoter Score used widely in business, but also aligns with the top level of evaluation in a model of evaluating technical communication products that I proposed in 1998 in *Technical Communication*.

Figure 1 summarizes the drivers of perceptions.

SAUL CARLINER *(saulcarliner@hotmail.com) is a professor of educational technology at Concordia University in Montreal, a past editor of the* IEEE Transactions on Professional Communication, *and a Fellow and Past President of STC.*

Drivers of Perceptions of Technical Communicators

Driver of Perceptions of Individual Services

Primary drivers	❑ Knowledge about the subject of the technical content as well as its use cases ❑ Excellent targeting (of the audience), writing, copyediting, and production skills
Secondary drivers	❑ Ability to "translate" technical content for the intended users ❑ User-centric approach ❑ Ability to collaborate ❑ Independent ❑ Strong client service skills
Also	❑ The perceived quality of the published content

Drivers of Perceptions of the Profession

Ranking of technical communication job titles by "customers"	Information Developer Information Architect Marketing Communicator Content Strategist UX Specialist Content Developer Technical Communicator Technical Writer Instructional Designer Documentation Specialist Technical Editor
And	❑ Given a choice, would the "customer" choose to work with the technical communicator again

Figure 1. Drivers of perceptions of technical communication

UPCOMING ONLINE COURSES

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- Be able to target your audience
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- Learn and apply key theory for TC work
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Register now at **www.stc.org/course/tc-bootcamp-apr-2021-copy**

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Wednesday 21 April 2021
12 Noon to 1:00 PM Eastern time (GMT-4)

Presenter: Leah Guren

Portfolios are strongly recommended for any tech comm professionals looking for work. Whether you are looking for an in-house position or trying to pick up new clients, a good portfolio is the best way to highlight your skills and abilities. It goes much further than your resume or CV; it can show prospective employers or clients the quality of your work, while giving you an opportunity to showcase how you solved problems.

This webinar discusses the need for a portfolio, as well as guidelines for developing one, including:

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- How to describe projects
- Dealing with NDAs
- Dealing with lack of work output to show
- Design best practices
- General tips and techniques

Register now at **www.stc.org/event/practical-portfolio-042121.**

Get Ready for

STC IS EXCITED to offer a virtual conference again this year to meet the ongoing educational needs of technical communication professionals across multiple time zones and to protect the wellbeing of attendees.

This year, attendees can expect a program that includes:

- Over a dozen Pre-Conference Workshops on Saturday and Sunday, 5-6 June
- Over 80 Education Sessions Monday through Wednesday, 7-9 June

The virtual Summit will consist of live and simulive sessions, available at times that are friendly for technical communicators the world over. By offering a virtual event, STC is able to expand the reach of the Summit to participants outside of North America and provide learning options for all participants who are unable to travel.

We are committed to offering a robust conference experience, including education sessions, preconference workshops, keynotes, vendor showcases, networking opportunities, and entertainment and social events. The goal of the STC Summit is to provide a broad range of topics for technical communicators—its depth and breadth reflecting the diversity of our profession, members, and attendees. Summit attendees will learn about new techniques, tools, and trends, as well as grow their skills and competencies.

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Attendees will have a rich program of opportunities for learning, networking, and engagement that includes:

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- The Expo Hall, where numerous vendors demonstrate products, services, tools, and technology in the world of technical communication.
- The Honors Event, where the best and brightest in the industry are honored by the Society.
- Additional social networking and entertainment events.
- Eight CEUs toward CPTC currency (applies only to those who are certified and cannot be counted retroactively).

Registration is Open Now!
5-9 June 2021 | Entirely online!
Visit **summit.stc.org**

2021 STC Election Results

Society for Technical Communication

Congratulations are in Order!

STC, THE NOMINATING Committee, and the Board of Directors are pleased to announce the results of the 2020 STC election.

Just over 18% of STC membership cast ballots in this year's election—or 362 of STC's 1,979 eligible members. Congratulations to those elected, and great appreciation is extended to all candidates for their dedication to STC and willingness to devote their time and energy to improving our Society by running for office.

President:

Kirsty Taylor (automatically succeeds from Vice President)

Vice President

		Votes
***	**Aiessa Moyna**	**146**
	Carolyn Klinger	137
	Miles Kimball	73
	Abstain	6

Treasurer

		Votes
***	**Bobbi Werner**	**199**
	Bethany Aguad	154
	Abstain	9

Director

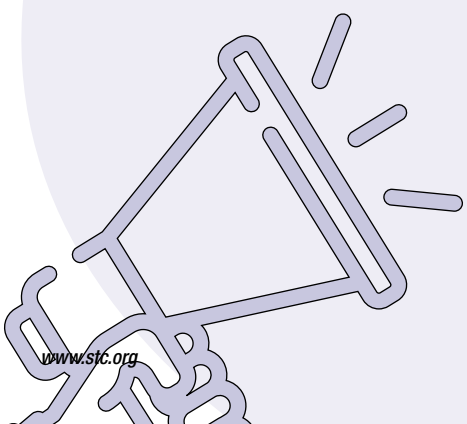
		Vote for Two
***	Sree Pattabiraman	186
	Joyce Lam*	150
***	Laura Palmer	147
	Karen Levine	132
	Theresa Daudier	71
	Abstain	7

Nominating Committee

		Vote for Two
***	**Jack Molisani**	**193**
***	**David Caruso**	**182**
	Kylie Jacobsen	174
	Roger Renteria	144
	Abstain	6

**Candidate withdrew after voting completed*

****Elected*



Congratulations!

Ethical COVID-19 Communication: Use Plain Language

BY RUSSELL WILLERTON | *STC Member*

THE COVID-19 VIRUS has killed millions around the world, sickened more than one hundred million, and changed the courses of lives, businesses, and nonprofits. As experts and authorities have tried to respond appropriately, their public messages have at times confused people. I believe authorities have an ethical responsibility to convey COVID-19 information clearly, and I argue that plain language can be part of an ethical communication strategy.

Ethics Viewpoints

There are many views on ethics, and I will only scratch the surface here with some mention of some major ideas.

Immanuel Kant is well known for his categorical imperative. His views are often called *deontological;* his is a top-down approach to ethics based on applying broad principles.

- The first formulation of his categorical imperative is "Act as though the maxim of your action were by your will to be a law of nature." That is, always embody reasoned positions about ethical action.
- The second formulation is "Act so that you always treat humanity, whether your own or someone else's, always as an end and never as means to an end." This is sort of akin to the Golden Rule, which is "Do unto others as you would have them do unto you" (although Kant tried to avoid letting self-interest affect decision making).

Another view of ethics is utility, which focuses on the positive effects of an action. *Utilitarianism* promotes the greatest good for the greatest number. John Stuart Mill and Jeremy Bentham wrote much about utility. Technical communication scholar Mike Markel calls utilitarianism the ethics behind cost-benefit analyses. But if ethics is measured only in terms of financial cost, other ethical principles may be left out of consideration.

Virtue ethics is an approach promoted by Aristotle in his treatise *The Nicomachean Ethics*. Good actions reflect virtues of the good life; the good is intrinsically good and right. Aristotle's virtues include courage, temperance, generosity, truthfulness, and friendliness.

Feminist approaches to ethics have become more prevalent in recent decades. Feminist approaches take into account the specific aspects of each situation. In some cases, they provide a counterpart to deontological approaches that are more concerned with universal applicability. The ethic of care is a feminist approach that involves responding to specific situations and taking relationships and imbalances of power into account.

Martin Buber wrote about dialogic ethics in the early 20th century. Dialogic ethics provides a way to understand human relationships as dialogue. His book, *I and Thou,* focuses on paired relationships. Do you regard the other as "Thou" or "You?" Or do you regard the other as "it?" In hierarchical relationships, there's the potential for the one with more power to regard the other as *it*. But Buber argues that when two parties view each other as *You* instead of *it*, they treat each other more humanely.

Literature Review Learnings

Through the course of doing the literature review for my book (Willerton, 2015), I learned several things. First, the review showed that professionals consider it ethical to communicate to audiences clearly and unethical to confuse or mislead them. Second, it showed how effective communication, which plain-language communicators strive to provide, meets the ethical standard of utility or the pursuit of the greatest benefit; however, utility pursued to the extreme can lead to unethical behavior. Third, the review showed that the Kantian perspective on individuals' rights and on imperatives to respect those rights complements goals of plain-language communication.

Fourth, feminist perspectives on ethics and communication recognize and address imbalances of power; plain-language communicators routinely write for audiences who lack power and agency in the situations they face. Fifth, the review showed how Buber's dialogic ethics provides a means of understanding and theorizing plain-language communication. Buber's dialogic ethics helps us see that we are not merely writing to an audience, but ideally writing with the audience.

Ethics and Plain Language

As I was thinking about ethics and plain language, I tried to focus on the things that go well in plain language. I tried to focus on the strengths. I then thought about the kinds of situations in which plain language solves problems, the kinds of situations where people benefit

from plain language. I developed an acronym for what I call BUROC situations. I used the perspectives of plain language professionals to help refine what BUROC means (Willerton, 2015).

B is for bureaucratic. These situations involve some kind of bureaucracy—layers of policies, procedures, and approvals that affect individuals' access to what they need or want.

U is for unfamiliar. People encounter these situations rarely or infrequently. These situations require people to use jargon, policies, and even facilities that are not immediately at their command or recollection.

R-O is for rights-oriented. These situations are especially important, because they affect individuals' choices to act within their rights—rights as citizens, as patients, as consumers, as humans.

C is for critical. These situations are weighty; they are important. People should not regard them lightly. They can have significant consequences for people facing them. These situations often arise without warning, and they might require urgent decisions or actions.

COVID-19 is a BUROC Situation

Bureaucracies frequently struggle to communicate effectively with their constituents. Within the bureaucracy, workers often lack agency to impact messages sent down from the top. The sign shown in Figure 1 repeats a policy statement rather than sending a clear message. The policy states "… institutions will require all faculty, staff, students, and visitors to wear an appropriate face covering while inside campus facilities/buildings where six feet social distancing may not always be possible. Face coverings are not required in one's own dorm room or suite, when alone in an enclosed office or study room, or in campus outdoor settings where social distancing requirements are met."

Figure 1. Sign repeating policy statement rather than sending clear message

So, what should a person do in a classroom with seating that promotes social distancing? Does social distancing replace the need for a mask? At least at this institution, the administration decided that no, social distancing in the classroom does not replace the need for a mask. Unfortunately, in a few instances, some instructors taught without masks, because the instructions were not clear.

Signs in plain language help people protect themselves by giving clear instructions.

The sample sign in Figure 2 gives clear instructions.

Wear Face Masks in Classrooms and Public Spaces

Figure 2. Sign giving clear instructions

The sample sign in Figure 3 sends a clear message.

Face Masks are Not Required in Dorm Rooms and Private Spaces

Figure 3. Sign sending clear message

Proponents of plain language frequently focus on the utilitarian benefits of plain language; plain language frequently saves readers time and saves companies money. In a situation like a pandemic, when people have many things to worry about and need to do certain things to protect themselves and their families, plain language can be a means of treating the audience with respect and care. In BUROC situations, plain language supports ethical action.

Columnist's note: This column is adapted from a presentation given by the author for the Access For All conference, hosted in October 2020 by Clarity International, the Center for Plain Language, and Plain Language Association International.

This column features ethics scenarios and issues that may affect technical communicators in the many aspects of their jobs. If you have a possible solution to a scenario, your own case, or feedback in general, please contact column editor Russell Willerton at *russell.willerton@gmail.com.*

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Getting Started Speaking at Conferences and Handling Pandemic Struggles

BY KIT BROWN-HOEKSTRA | *STC Fellow* **AND CINDY CURRIE** | *STC Fellow*

I have a few years of experience and want to start speaking at conferences. How can I build my skills?

That's great! The tech comm community is always looking for new voices with unique perspectives. The best way to start is to start. By that we mean, pick some topics that are relevant to the conference themes and submit proposals to conferences that sound interesting to you. Take some workshops on giving presentations, join Toastmasters. Watch TED Talks and keynote speakers for pointers. Practice by volunteering to give a webinar or speak for a chapter meeting or for a class at a university. Ask a trusted friend or colleague to listen to your presentation as you practice.

Here are some recommendations for a stellar presentation:

- Look through conference programs, blog posts, and journal articles for the past year. What topics are trending? What is interesting to you? Have you done something new and cool that you think other people might be interested in?
- Remember that your audience is there because they want to hear what you have to say. They are on your side and want you to be successful.
- Use graphics in your presentation, and limit the number of words on the slides.
- Refine your message. Plan to spend 30 seconds per slide. Make sure that you are clear about what you want to say.
- Pick two to three main points, and build the presentation around them. Clearly identify what you want people to take away from your presentation.
- Include recent events, and refer to earlier sessions at the conference where you are presenting.
- Provide handouts that support your message.
- Practice your delivery, and if you are presenting online, do a tech check to make sure everything is working properly and you are well lit.
- Practice some more.

I'm really struggling with staying focused after months of this pandemic. What are some strategies I can use?

You are not alone. Most people are struggling at this point in the pandemic. Time is moving weirdly,

because we don't have as many social cues and event markers to frame the passage of time, and we aren't seeing as many people in person. Everyone seems on edge and stressed. We are all flying a little blind as we navigate this situation, and doesn't look like it's ending soon, so we need to pace ourselves.

Some things that have helped us:

- If possible, *get outside* every day and go for a walk in nature (socially distanced, of course). Breathing fresh air and feeling the sun on your face is remarkably healing. Hugging a tree (or just leaning against one) is amazingly healing.
- *Start meditating daily*, even if it's only for 10 minutes. Oprah Magazine recently provided a list of the best apps.
- *Get enough sleep*. It can be challenging to sleep with everything that is happening in the world. Make sure you have a good sleep routine, and turn off your electronic devices.
- *Limit your doomscrolling*. This can be hard because there is an almost obsessive need to know what's happening. Set a timer for 10 minutes, and make yourself stop when the time is up (or set automatic blocks on your social media apps). Turn off notifications.
- *Set aside one day a week for digital detox,* and go completely off line. Use the time to read a physical book or magazine, garden, engage in a hobby or interest, play board games, do a jigsaw puzzle, play with your pets, or hang out with your family.
- When you feel yourself getting anxious, *pause and take three deep breaths*: Inhale through your nose, hold for 7 seconds, and exhale through your mouth.
- *Take a drive, and have a picnic***.** A change of scenery can do wonders for our mental and emotional health. Driving is a safe, self-contained activity that changes your perspective. Windshield time is great for unsticking the brain.
- *Phone a friend***.** Talking to people we love and care about can help us re-center.
- *Keep a daily gratitude journal***.** Write down (by hand) three things that you are grateful for today—big or small. Taking time to be grateful helps us orient our brains toward more of what is positive and good.
- *Try a new hobby***.** When we are feeling uncreative and tired, this might seem counterintuitive, but by engaging your brain in a new way, you can distract yourself from the world for a while.
- *Take a mental health day***.** Companies are reporting that people are taking fewer vacation days—probably because it's so hard to go anywhere—but we need breaks, even short ones, to rest and recharge our brains. This is a marathon, not a sprint, so we need to pace ourselves.

Most importantly, schedule and practice regular self-care. This is particularly important if you have lots of demands on you or lots of additional stressors.

Our company has been working from home since the pandemic started. My boss seems to think that we don't need time off and that we should be available 24/7. I'm getting super burned out. How can I talk to my boss about needing some time off?

This is a challenging problem, because everyone is worried about staying employed right now. It's also unreasonable to ask employees to work this hard when there is an ongoing global crisis happening.

Ask a Tech Comm Manager is an advice column geared toward answering all those questions you have, but might be uncomfortable asking. We glean the questions from social media, forums, and most importantly, from you, dear reader. If we don't know an answer, we will interview experts and get information for you. Send us your questions to *kitbh.stc@gmail.com* or tweet them to *@kitcomgenesis* or the hashtag *#askTCmgr*.

Look at this as a business case, and present it to your boss with a solution. First, find out why the boss is pushing you so hard right now. What is the business problem he or she is trying to solve? Identify some solutions that allow you and your team to work reasonable hours. Do some research on burnout and productivity, and present data to back up your ideas.

At the same time, start blocking out times in your schedule as "focus time." Make sure your calendar shows the time as "Busy," so people don't book you for meetings during that time. Practice good self-care, and take time off when you need it (be sure follow procedures for requesting the time off).

In addition, there are very few content emergencies that require a 24/7 response. If you are working with global teams, rotate the pain so that one person on the team isn't always having meetings in the middle of the night. Pick one day/evening during the work week that is meeting-free.

If your company is uninterested in rethinking their policies, start looking for another job. There are lots of opportunities out there. Use your network and find something that is a better fit.

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Automating the Production of Software Documentation Videos: An Interview with Mark Hellinger

BY SCOTT ABEL | *STC Associate Fellow*

AN INCREASING NUMBER of technical communication organizations produce video documentation, instructional videos, explainer videos, and product simulations and demonstrations. Video production has increased dramatically since 2017, when only 11% of those surveyed by The Content Wrangler said they created video documentation. More recently, 50% of technical communication teams surveyed in 2020 say they produce video but only for some of their products.

Producing video can be problematic—not all tech comm teams have the experience and the tools required to do it well—and the cost can be prohibitive. The frequency of content updates, the cost of localization and translation, and the need to produce documentation deliverables at scale exacerbate the challenges. Technology is beginning to provide us with solutions that can help us overcome these and other video-making challenges.

In this installment of *Meet the Change Agents*, I introduce you to Mark Hellinger, Chief Marketing Officer at software maker, Videate. The company aims to make ubiquitous and straightforward the automatic assembly of video content from software product documentation.

SA: Thanks for agreeing to share your insights on the topic of automating the generation of technical documentation video assets at scale, Mark. To help provide some context for this interview, can you tell our audience who you are and what your connection to the technical communication industry is?

MH: I am the Chief Marketing Officer for Videate. We have built a platform to automate the production of software videos using AI and robotic process automation. I've been working in the technical communication field for over 15 years, and I'm excited to have the opportunity to share a little about our product, Videate, a software product that allows you to automagically make technical documentation videos.

SA: According to Cisco, by 2022, video content will make up more than 82% of all consumer internet traffic—15 times more than it was in 2017! And while those statistics are impressive, consider that 59% of executives say they prefer watching a video over reading text.

There are many reasons the automated production of video from product documentation is attractive to organizations battling for their prospects' attention and their customers' loyalty. Setting aside the obvious benefit of providing technical documentation content to those who require it in multiple formats, what are some of the other drivers that spur the automatic generation of video from software documentation adoption?

MH: The number one reason for providing video documentation is customer choice. Some people prefer to read documentation, and others prefer to watch videos. Video preference has increased by over 50%, and there are clear use cases for customer education, technical support, marketing, and client success. Video is now a critical resource in a customer journey—from acquisition to retention.

SA: Videos have a much higher click-through rate than does text content. Can adding instructional video alongside text-based documentation impact how search engines rank our content?

MH: Buyers have become conditioned to watch videos as

they research products, especially executive decision-makers for B2B software.

End-users want video. Studies consistently show that video support improves the user experience. Video influences click-through rates and impacts the length of time people spend on a webpage. Videos help lower bounce rate—the percentage of website visitors who navigate away from your content without much interaction—one of the primary challenges associated with providing only textual content.

Generating videos from your documentation allows you to align text and videos, increasing content consumption and improving your SEO ranking.

SA: In the spring of 2020, I interviewed Wouter Maagdenberg of TXTOMedia, about his company's approach to producing video documentation at scale using structured content. Wouter mentioned that his firm saw much potential in helping companies build at-scale, instructional videos for physical products, pointing out that video documentation is most useful in assisting customers in repairing, assembling, cleaning, and maintaining tangible goods. That makes sense to me, given the nature of the products and the needs of the consumers.

But your company is working to help companies that produce *intangible* goods, like Software-as-a-Service (SaaS) products, to automate video production from documentation at scale. Why would a SaaS company want to generate videos from technical documentation?

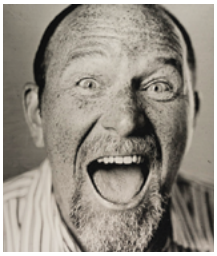
MH: The challenge with SaaS products is different from physical products. Software development is agile, meaning continuous change. Keeping technical documentation up to date is already challenging with bi-weekly, monthly, and quarterly releases. If you make videos, they, too, need to stay up to date with each release.

Up-to-date product information is no longer limited to being distributed after someone purchases a product. It's also essential in the decision making that occurs when consumers consider what products to purchase. With B2B software, out-of-date video content is a liability. Frustration and confusion occur when consumers encounter video content that fails to align with the product they are evaluating.

If your product information does not match your software, you have a marketing problem. Videos are quickly becoming more important than documentation. If you can consistently produce videos with each new release, you can provide your marketing organization with very high value in their eyes. When technical communication teams build the capability to deliver up-to-date videos of value to the marketing team consistently, they dramatically increase their value across the entire organization.

As the buyer's journey extends from prospects to paying customers, videos impact customer retention and loyalty. Users need up-to-date educational and technical support videos. Both documentation and videos are vital for customer acquisition and retention.

Making videos is time-consuming, people-intensive, and potentially expensive. Technical documentation teams, especially those who have implemented structured content approaches, are in a unique place to create a scalable and sustainable video production process with newly available technology.



In the digital age, change happens quickly. This column features interviews with the movers and shakers—the folks behind new ideas, standards, methods, products, and amazing technologies that are changing the way we live and interact in our modern world. Got questions, suggestions, or feedback? Email them to *scottabel@mac.com*.

SA: Clearly, there are many business reasons for producing technical documentation videos. Now that you've helped us understand how keeping videos up to date can benefit organizations, can you talk a bit about how your solution works?

MH: Videate is an application that discovers what's inside your existing product documentation. We use machine learning and automation to gain an understanding of your software. We learn where individual elements of a software product's graphic user interface (like icons or menu items) are located. We use this knowledge to automatically generate video documentation that, for example, instructs a user to click on a particular icon or explains how to fill in a form.

Here's how it works. We use your text to navigate your software. We synchronize the movement as if you were moving the mouse and speaking the words using a screen-recording tool. You can add video-only animation instructions to your documents to further enrich the experience.

Simultaneously, we use text-to-speech technology from leading providers like Amazon, Microsoft, and Google to generate the voice. It's synchronized with the on-screen movement as we record. The process results in the automated production of software videos. Our customers often generate video documentation

in mp4 format, but we support several other video formats, including playlists.

With Videate, there's no post-production processing to edit out pauses, stammers, breathing, noise, or errors. We generate videos from the text-based files you are already creating. As you update your existing content, the video versions are updated as well. Using this approach, whenever you release software, you'll be able to provide up-to-date video documentation, even when you are busy making last-minute user interface changes.

Documentation teams that produce semantically rich, intelligent content have a huge advantage over those that don't. Feeding our system with intelligent content reduces the amount of work required to "train the engine" significantly, without content rework. We can automatically capture screenshots as we are making the videos, eliminating work for the documentation team. We've had customers justify the cost of the platform on this alone.

SA: Automation is a requirement for organizations looking to increase efficiency and grow exponentially. Do you encounter people who don't believe that automated video production can yield quality video products?

MH: Our north star is what we call the "Video Turing Test." In 1950, Alan Turing evaluated natural language conversations between humans and computers using text-only responses. If a human evaluator could not tell the difference after five minutes of interaction, the computer passed the test. Seventy years later, the text-only Turing Test makes way for computer-generated speech.

We're used to hearing Alexa, Siri, and Google Assistant in our daily lives. And yet, when it comes to using a computer-generated voice in software videos, there is skepticism that users will find it acceptable. We asked a wide range of B2B software end-users this question, "Given the choice of having up-to-date software videos with computer-generated voices or out-of-date software videos with human voices, which would you prefer?" The preference: Always up-to-date videos with computer voices.

We have seen text-to-speech technology improve by orders of magnitude every few months, and we believe Videate now passes the Video Turing Test. Personalized voice is currently cost-prohibitive (except for larger enterprises), but it will be soon become much more affordable. The auto-generated voice has come of age.

SA: Besides structured content and the right technology, what is required to make top-quality automatically generated video documentation?

MH: As Alfred Hitchcock said, "To make a great film, you need three things—the script, the script, and the script." If you have quality product documentation, you can produce quality videos automatically. Garbage in, garbage out; it all starts with the input.

If you record videos manually, you still need to start with a script. While a few people can make one-off videos, most software videos require collaboration with subject matter experts and increasingly with product management and brand voice teams. So to get quality videos, you always need quality scripts, and they need to be updated every time there is a new software release.

Many technical documentation teams understand how to write, follow terminology standards, and succinctly communicate information. Maybe a Ridley Scott quote would have been better. He said, "Once you crack the script, everything else follows."

SA: For companies that frequently update their technical communication content, how does your solution help them stay on schedule and produce video content on time?

MH: Every time you update your documentation, you must update your videos. Add a new form field or change the name of your product (or a component within it), and you have to update your docs. Technical communication shops that follow a single-source content development model understand how to efficiently do these types of updates. They do it when they push updated renditions of their content to multiple channels, like PDF, HTML, and online help.

Most documentation includes images. Image management is an expensive and time-consuming problem, particularly if you produce video documentation to augment text-based user assistance. Every time you change a product or its graphic user interface, chances are good you'll also need to create new (or update existing) screenshots. This task can be made more challenging for products that support multiple languages (you have to take screenshots optimized for each language).

Determining which screenshots to update, which ones to capture, and which ones to replace are labor-intensive and expensive. You can't republish the content until you tackle all these image challenges.

Creating high-quality video documentation requires us to manage images efficiently and effectively. Videate eliminates the

need to edit videos by hand. Our machine learning-powered system reduces the cost and manual labor associated with making new screenshots. This approach not only increases productivity and speeds time-to-market, but it also reduces other difficulties introduced during editing, like voice synchronization issues.

SA: Many technical communication shops produce content in multiple languages. How does your approach impact the translation of videos?

MH: There are two common approaches to translate videos. The first is to dub the audio from the original language into another language. This often leads to synchronization challenges worse than watching a movie when the actors' voices and lips are out of sync. Phrases in foreign languages are not the same length as your source language, and technical jargon is difficult (and sometimes impossible) to translate.

The second is to re-record the video in each language you support, but this is not a scalable approach. The frequency of releases and the manual effort necessary makes this approach cost-prohibitive.

Because Videate relies on a script (your existing software documentation, for example) to automate video production, you can apply the tools and methods you already use to translate your technical documentation. When you translate the script, we regenerate the software video in the cloud by automatically re-synchronizing with your source content. Each time you update the script, Videate automatically creates a new version of the video.

SA: I've heard you say that you're not just repacking existing content into a new format, but that you're using machine learning to help make our content better. What do you mean by this?

MH: Without giving away our patent-pending secrets, we have a couple of tools to drive machine learning. We use *natural language understanding* (NLU) and *robotic process automation* (RPA) to analyze, infer, and generate human behavior. We learn about your software and read and understand your documentation.

Our engine generates behavior—filling out forms, selecting pulldowns, ticking checkboxes—acting on these things in the way humans do. Over time, as your corpus of documents grows, our engine learns and gets smarter.

We are working with some multinational customers who document complex software, and the model we use is improving every day as a result. New clients get the benefit of the thousands of documents we have analyzed to produce videos.

SA: Let's talk a bit about cost. Wouldn't it be cheaper to produce videos overseas using a low-cost outsourcing agency?

MH: Outsourcing video production doesn't save you time or money. Whatever money you think you can save by going offshore, you will pay in terms of quality or post-production time. With Videate, there are no mistakes. You don't have to edit the videos to remove noise. You always record with the best equipment.

Our pricing considers the actual costs of manually producing video, both on-shore and off-shore. Our consumption-based model means you pay for the number of hours of video you make. You can render as often as you like but only pay for the videos you complete.

The entry point is US $2,000 a month with an annual contract. At worst, it's break-even if you have one release a year. If you have two or more releases a year, the ROI is compelling. And as a bonus, you get automated screenshots to use in your other documentation deliverables. It scales as your video production scales.

SA: How can a technical documentation team discover whether they can create video-on-demand at scale using your solution?

MH: We're not quite at the point of full, self service, yet, but we offer a free proof-of-concept. The process is simple. We sign a nondisclosure agreement, you provide some sample documents and credentials to a test or trial environment, and we make videos for you. We review them with you and iterate to generate videos that look and sound great. Then, we show you how to do it yourself.

SA: I'm afraid we've run out of time. Thanks for taking the time to explain your approach to producing automated video documentation at scale. It's a great use of machine learning-enabled technical communication. I'm certain you are onto something big.

MH: Thank you very much, Scott! We've solved a problem in need of a solution, and we are getting better at it every day. One final quote, "Any sufficiently advanced technology is indistinguishable from magic." – Clarke's Third Law.

An Ode to Words

BY MICHELLE CORBIN

TO SURVIVE THE COVID-19 pandemic and all its social distancing and isolation, I turned to my crafty endeavors. I knit scarves—yes, only scarves, because anything more complicated was just too stressful. I also create quilts—from simple, traditional blocks and patterns, because that's enough creativity amidst all that math. However, neither yarn nor fabrics can compare to my favorite artistic medium: Words.

My undergraduate degree is in English, and I took two independent study courses in British poetry and the Romantic poets. I loved writing sonnets, but also writing free verse, filling many notebooks with my angst and my musings. Unfortunately, as I fell into my technical communication career, I found it very difficult to write poetry. Focusing on writing for users to help them achieve their goals and get their job done, and focusing on all that technical jargon, just drained the creativity right out of me.

Enter haiku, the perfect poetic form for technical communicators. In traditional Japanese haiku (not the Americanized 5-7-5 version you're sometimes taught in high school), every word must sing. Haiku poets choose every single word carefully, agonizing over the parts of speech that they use, agonizing over nuances of the words that they use, and analyzing their favorite dictionary and thesaurus to see if a related word just fits better. You have three lines, with three or four words on each line, to try to capture the perfect "haiku moment" (or Zen moment).

The following is one of my haikus that I wrote in January of 2021, as I sipped a hot cup of tea, looking out my home office window (can you guess what I was really supposed to be doing?).

a light dusting
of bright white snow —
the blank page

In the summer of 2020, I took a free online course on writing haiku, which really helped me learn more of the writing conventions. I still found myself breaking the rules, which I admittedly do in my day job, as well—being a technical editor means that I know what the rules are and can choose when and how to break them effectively for my reader. This is a haiku that I wrote as homework for that haiku course that broke the rule of not using punctuation other than the dash.

dandelion "flowers"
break through clover "grass" —
perspectives

My experiences as a technical communicator—editing user interfaces and error messages, writing and editing topic-based online information, and analyzing and applying all kinds of style and word usage guides to any form of technical communication—have greatly enhanced my crafty endeavor to capture the Zen moments of my life in haiku.

MICHELLE CORBIN *(michelle.l.corbin@gmail.com) is officially a senior software engineer at IBM, although she claims senior technical editor and information architect as her title (self-proclaimed "content ninja" after a manager said she could use any title). With over 25 years of experience as a technical communicator, she has an unwavering passion for technical editing, a penchant for information architecture, and a continued interest in online information design and development.*

Resources

These four resources are among my favorite online resources for learning more about writing traditional Japanese haiku and capturing your own Zen moments.

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STC Online Courses	6
STC Summit Pre-Conference Courses (full day)	6
STC Summit Pre-Conference Courses (half day)	3
STC Annual Summit	8
Begin and complete a college-accredited course related to the Technical Communication field	8
Published articles that relate to any aspect of *Technical Communication* (2/article)	2
Published books publicly available on topics related to *Technical Communication* (5/book)	5
Presentations at conferences related to aspects of *Technical Communication* (2/presentation)	2
Total needed within 2 years post-certification date	**12**

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